| | | | | | | | / | 612 |
|--------------------------------|-------------------------|-------------------------------|---|--|---|-------------------------------------|-------------------------|---|
| | 00 | 0 | 1 2 | | l- | T. | • | OMB No 1545-0047 |
| Form | , 99 | U | Return of Org | anization Exempt | From II | icome i | ax | 0046 |
| | | | Under section 501(c), 527, or 4 | 947(a)(1) of the Internal Reven | ue Code lex | cent private fo | undations | , 2016 |
| | | | 1 | security numbers on this for | | | | Open to Public |
| | | the Treasury se Service | li e e e e e e e e e e e e e e e e e e e | Form 990 and its instructions | | | | Inspection |
| _ | | | ndar year, or tax year beginning | | 16, and end | | 2-31 | , 20 16 |
| | | applicable. | C Name of organization Freedom an | | | | | or Identification number |
| | Address | - | Doing business as | ia Opportunity valie inc | | | 1 | 81-1199959 |
| | Name ch | te number | | | | | | |
| | initial reti | (571) 247-3688 | | | | | | |
| _ | Final retur | <u> </u> | | | | | | |
| | Amended | | City or town, state or province, coun Washington, DC 20005 | | | | G Gross re | ce:pts \$ 6,285,942 |
| | | on pending | F Name and address of principal office | Leonard Leo, President | | H(a) is this a | group return for s | subordinates? Yes No |
| _ | | | FOF, 1030 15th Street, NW, Suite | | 05 /7 | | | included? Yes No |
| , | Tax-exer | npl status | | 4) ◀ (insert no) ☐ 4947(a)(1 | | | | list (see instructions) |
| J | Website | | | | 7 | H(c) Groun | exemption | number 🕨 |
| K | Form of a | rganization | Corporation Trust Associa | tion ☐ Other ► // | L Year of form | nation: 2018 | M State | of legal domicile. DE |
| P | art I | Summ | ary | // | | | | |
| | 1 | Briefly de | escribe the organization's missi | ion or most significant activi | ities: The | mission of the | Organizat | ion is to operate as a |
| 8 | ł | sponsor (| of "donor advised funds" seeking | g to: combat runaway spendi | ng, corrupti | on, and crony | sm, prom | ote 1st Amendment and |
| Governance | İ | | et principles; generate economic | | | | | |
| er. | 2 | Check th | is box ▶☐ if the organization i | discontinued its operations | or disposed | of more tha | n 25% of | its net assets. |
| စ် | 3 | Number | of voting members of the gove | ming body (Part VI, line 1a) | | | . 3 | 4 |
| e 5 | 4 | Number | of independent voting member | s of the governing body (Pa | irt VI, line 1 | b) | . 4 | 4 |
| zies | 5 | Total nur | nber of individuals employed in | n calendar year 2016 (Part V | /, line 2a) | | 5 | 0 |
| Activities & | 6 | Total nur | mber of volunteers (estimate if i | necessary) | | | . 6 | 0 |
| Ac | 7a | Total unr | elated business revenue from i | Part VIII, column (C), line 12 | | | . 7a | |
| | b | Net unre | lated business taxable income. | from Form 990-T, line 34- | <u>, , , , , , , , , , , , , , , , , , , </u> | <u> </u> | . 7b | |
| | | | } | RECEIVE) | 1 | Prior Y | ear | Current Year |
| به | 8 | | tions and grants (Part VIII, line- | | | | 0 | 6,285,850 |
| 200 | 9 | | service revenue (Part VIII) line | 2g) | | | | |
| Revenue | 10 | | ent income (Part VIII, column (A | | | | 0 | 92 |
| - | 11 | Other rev | venue (Part VIII, columi 🙉 line | s 5, 6d, 8c, 9c, 10c, and 1 | (e) | | | |
| | 12 | | enue-add lines 8 through 14;(n | | (A), line 12) | | 0 | 6,285,942 |
| | 13 | | nd similar amounts paid (Part.) | | | | 0 | 5,021,000 |
| | 14 | | paid to or for members (Part I) | | | | | |
| es | 15 | | other compensation, employee I | | lines 5–10) | | | |
| Expenses | 16a | | onal fundraising fees (Part IX, c | | | | - El - B - 1 | 777 |
| Š | ь | | draising expenses (Part IX, col | | 0 | 11.2.7.50 | | 这种企业型型企业的国际 |
| w | 17 | | penses (Part IX, column (A), lin | · · · · · · · · · · · · · · · · · · · | | ļ | 0 | 27,357 |
| | 18 | | penses. Add lines 13-17 (must | • | ne 25) . | | 0 | 5,048,357 |
| _ | 19 | Revenue | less expenses. Subtract line 1 | 8 from line 12 | · · · · · | | 0 | 1,237,585 |
| Net Assets or Fund Balances | 0.5 | T-4.4 | | | | Beginning of C | | End of Year |
| 250 | 20 | | sets (Part X, line 16) | | | | 0 | 1,237,585 |
| Ž | 21 | | oilities (Part X, line 26) | | | ļ | 0 | 0 |
| _ | | | ets or fund balances Subtract I | ine 21 from line 20 | <u>· · · · · </u> | .l | 0 | 1,237,585 |
| | art II | | ture Block | | | | | 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - 1 - |
| Ur | ider pena ie. correc | libes of perjo t. and comp | ury, I declare that I have examined this in elete. Declaration of preparer (other than | return, including accompanying scr n officer) is based on all information | of which prepi | atements, and to Brerhas anv kno | ine best of I viedae | my knowledge and belief, it is |
| | | 1 | (| | | | | 7. 12 |
| Sig | 20 | 500 | perture of officer | | | | Pate | 30-18 |
| | ere | | | /Transcerous | | | qio | |
| * 16 | | Tim | Tonathan Burch | /Treasurer | | | | |
| _ | | | ype preparer's name | Preparer s signature | | Date | | C PTIN |
| | aid | | • | Thursund Coxlon | 124 | 01-26-18 | Check self-em | U #] |
| | epare | 7 | mond Conlon, CPA | | 1 418 | | | ployed P01486002 |
| Us | se On | | | | | | m's EIN 🕨 | 201 500 5051 |
| MA | w tha li | | address PO Box 6213, Silver Siss this return with the preparer | | ions) | [P | nane no. | 301-598-6851 ☐ Yes ☑ No |
| _ | | | | | | 1 No 11282Y | | Form 990 (2016) |
| ro | reper | work Kedi | uction Act Notice, see the separa | また (13000に10113. | Ça. | NU 112021 | | 1 0111 000 (EU (D) |



| Part | |
|------|--|
| | Check if Schedule O contains a response or note to any line in this Part III |
| 1 | Briefly describe the organization's mission: |
| | The mission of the Freedom and Opportunity Fund is to operate as a sponsor of "Donor Advised Funds" that seek to: combat |
| | runaway government spending, corruption, and cronyism; promote First Amendment and free market principles; generate wide- |
| | spread economic opportunity; and educate Americans about the benefits of limited government and free enterprise. |
| 2 | Did the organization undertake any significant program services during the year which were not listed on the |
| - | prior Form 990 or 990-EZ? |
| | If "Yes," describe these new services on Schedule O. |
| 3 | Did the organization cease conducting, or make significant changes in how it conducts, any program |
| | services? |
| | If "Yes," describe these changes on Schedule O. |
| 4 | Describe the organization's program service accomplishments for each of its three largest program services, as measured by |
| | expenses. Section 501(c)(3) and 501(c)(4) organizations are required to report the amount of grants and allocations to others, |
| | the total expenses, and revenue, if any, for each program service reported. |
| | |
| 4a | (Code:) (Expenses \$ 5,021,000 including grants of \$ 5,021,000) (Revenue \$) |
| | Since beginning operations in April 2016, as a sponsor of donor advised funds, the Freedom and Opportunity Fund processed |
| | 18 different grants to organizations that seek to combat runaway government spending, corruption, and cronyism; to promote |
| | First Amendment and free market principles; to generate widespread economic opportunity; and to educate Americans about |
| | the benefits of limited government and free enterprise. |
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| | |
| 4b | (Code:) (Expenses \$ including grants of \$) (Revenue \$) |
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| 4c | (Code:) (Expenses \$ including grants of \$) (Revenue \$) |
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| | Other program convices (Describe in Schedule O.) |
| 4d | Other program services (Describe in Schedule O.) (Expenses \$ including grants of \$) (Revenue \$) |
| 4e | Total program service expenses ► 5,021,000 |
| | |

| Form 99 | _{0 (2016)} 81-1199959 | | | Page 3 |
|---------|---|-----|---------------|-------------|
| Part | | | | |
| | | | Yes | No |
| 1 | Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If "Yes," complete Schedule A | 1 | | 1 |
| 2 | Is the organization required to complete Schedule B, Schedule of Contributors (see instructions)? | 2 | 1 | |
| 3 | Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I | 3 | | 1 |
| 4 | Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? <i>If "Yes," complete Schedule C, Part II</i> | 4 | | |
| 5 | Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? If "Yes," complete Schedule C, Part III. | 5 | | ✓ |
| 6 | Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes," complete Schedule D, Part I | 6 | 1 | |
| 7 | Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? If "Yes," complete Schedule D, Part II | 7 | - | 1 |
| 8 | Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part III | 8 | | 1 |
| 9 | Did the organization report an amount in Part X, line 21, for escrow or custodial account liability, serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? If "Yes," complete Schedule D, Part IV | 9 | | 1 |
| 10 | Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? If "Yes," complete Schedule D, Part V | 10 | | 1 |
| 11 | If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable. | | | |
| а | Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," complete Schedule D, Part VI | 11a | | √ |
| þ | Did the organization report an amount for investments—other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII | 11b | | 1 |
| С | Did the organization report an amount for investments—program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VIII | 110 | | 1 |
| d | Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part IX | 11d | | 1 |
| e f | Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If "Yes," complete Schedule D, Part X. | 11e | | √ |
| 12 a | Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete Schedule D, Parts XI and XII | 12a | | _ |
| b | Was the organization included in consolidated, independent audited financial statements for the tax year? If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional | 12b | T | 1 |
| 13 | Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E | 13 | | 1 |
| 14 a | , , , , , , , , , , , , , , , , , , , | 14a | | ✓ |
| b | Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? If "Yes," complete Schedule F, Parts I and IV. | 14b | | 1 |
| 15 | Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? If "Yes," complete Schedule F, Parts II and IV | 15 | | 1 |
| 16 | Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? If "Yes," complete Schedule F, Parts III and IV. | 16 | | 1 |
| 17 | Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I (see instructions) | 17 | | 1 |
| 18 | Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? If "Yes," complete Schedule G, Part II | | | 1 |
| 19 | Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If "Yes," complete Schedule G, Part III | 19 | | 1 |
| | | For | m 99 0 | (2016) |

| 20 a Did the organization operate one or more hospital facilities? If "Yes," complete Schedule H. b if "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return? Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or port more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line ?? If "Yes," complete Schedule I, Parts I and II . 21 J Did the organization neaver "Yes" to Part IVI, Section A, line 3, 4, or 5 about compensation of the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? If "Yes," answer lines 24b through 24d and complete Schedule K. If "No." go to line 25a 25b Did the organization mantain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? d Did the organization act as an "on behalf of Issuer for bonds outstanding at any time during the year to defease any tax-exempt bonds? d Did the organization act as an "on behalf of Issuer for bonds outstanding at any time during the year to defease any tax-exempt bonds? d Did the organization act as an "on behalf of Issuer for bonds outstanding at any time during the year to defease any tax-exempt bonds? d Did the organization act as an "on behalf of Issuer for bonds outstanding at any time during the year? d Did the organization act as an "on behalf of Issuer for bonds outstanding at any time during the year? b Issuer for bonds of the second of the year to defease any tax-exempt bonds? D Did the organization with a disqualified person during the year? If "Yes," complete Schedule L, Part II to the organization and appropriate Schedule L, Part II to the organization of the policy and the policy an | Part l | V Checklist of Required Schedules (continued) | | | |
|---|------------|--|-----------|---------|--|
| b If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return? 20b | | | | Yes | |
| 21 bil the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 71 ft "res," complete Schedule I, Parts I and III 21 J 11 J 21 J 21 J 21 J 22 D 22 J 24 J 24 J 25 J 25 J 25 J 25 J 25 J | _ | | | | ✓ |
| domestic government on Part IX, column (A), line 17 if "Yes," complete Schedule I, Parts I and II". 21 Did the organization report more than \$50,00 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 21 if "Yes," complete Schedule I, Parts I and III 22 J Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization is current and former officers, directors, trustees, key employees, and highest compensated employees? If "Yes," complete Schedule I, Part II and the susue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? If "Yes," answer lines 24b through 24d and complete Schedule II. This," of the line 25a b Did the organization invest any proceeds of tax-evempt bonds serow at any time during the year to defease any tax-exempt bonds? c) Did the organization invest any proceeds of tax-evempt bonds serow at any time during the year? 25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? 25b It the organization area as no no behalf of "issuer for bonds outstanding at any time during the year? 25c It is the organization and the transaction with a disqualified person during the year? 25c If "Yes," complete Schedule II, Part II b is the organization area that it engaged in an excess benefit transaction with a disqualified person of the theory of the organization of proferms 980 or 990-EZ7 (If "Yes," complete Schedule II, Part II | | | 20b | | |
| 22 V 23 Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), ine 27 if "Yes," complete Schedule Parts and III 23 Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization scurrent and former officers, directors, trustess, key employees, and highest compensated employees? If "Yes," complete Schedule V 24 Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the leaf day of the year, that was issued after December 31, 2002? If "Yes," answer lines 24 24 Did the organization marks any proceeds of tax-exempt bonds beyond a temporary period exception? V 25 Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? 26 Did the organization and as an "on behalf of" issuer for bonds outstanding at any time during the year? 26 Section 501(6)(3), 501(6)(4), and 501(6)(2) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I 27 Did the organization aware that it engaged in an excess benefit transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part II 28 Did the organization provide a grant or other assistance to an officer, director, trustee, key employees, or disqualified persons? If "Yes," complete Schedule L, Part II 27 Did the organization provide a grant or other assistance to an officer, director, trustee, key employees, or disqualified persons? If "Yes," complete Schedule L, Part IV 28 Was the organization provide a grant or other assistance to an officer, director, trustee, or a 55% controlled and the proper officer, director, trustee, or eyemployee? If "Yes," complete Schedule L, Part IV 29 Did the organization provide a grant or other assis | 21 | | 21 | 1 | ĺ |
| Part IX, column (A), line 2' If "Yes," complete Schedule I, Part II and III 23 Did the organization answer "Yes" to Part IVI, Saction A, line 3.4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highast compensated employees? If "Yes," complete Schedule J. 24a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was lesued after December 31, 2002? If "Yes," answer lines 24b through 24d and complete Schedule IX "IV", "or yo foline 25a b Did the organization invest any proceeds of tax-exempt bonds eyen at temporary period exception? c Did the organization and account other than a refunding ascrow at any time during the year? to defease any tax-exempt bonds? d Did the organization as an "on behalf of" issuer for bonds outstanding at any time during the year? 25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-E27 if "Yes," complete Schedule L, Part II "Yes," comp | 22 | | <u></u> - | • | |
| organization's current and former officers, directors, trustees, key employees, and highest compensated employees? If "Yes," complete Schedule J. J. 24a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to fine 25a 25a Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? 25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? 25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit transaction with a disqualified person in a prior year, and that the transaction bars not been reported on any of the organization sprior Forms 990 or 990–E27 If "Yes," complete Schedule L, Part II 25b Unit the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or former officers, directors, trustees, key employees, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? If "Yes," complete Schedule L, Part II 25b V Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV 26c A family member of a current or former officer, director, trustee, or key employees; if "Yes," complete Schedule L, Part IV 27c V J Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If "Yes," complete Schedule L, Part IV 27d J Did the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Part II, III, or IV, III, and Part V, line I J Did the organization have a controlled entity within the meaning of section 512(| | | 22 | | 1 |
| employees? If "Yes," complete Schedule J. A Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a b Did the organization mantain an escrow account other than a refunding secrow at any time during the year to defease any tax-exempt bonds? d Did the organization natatian an escrow account other than a refunding secrow at any time during the year? d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? 25a Section 501(e)(3) 601(e)(4), 601 501(e)(4), 601 501(e)(5), 6 | 23 | | | | |
| 24a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? Did the organization area as an "on behalf of" issuer for bonds outstanding at any time during the year to defease any tax-exempt bonds? d Did the organization area as an "on behalf of" issuer for bonds outstanding at any time during the year? 25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I b Is the organization area that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990–E27 If "Yes," complete Schedule L, Part II . 25b Ut the organization proord any amount on Part X, line 5, 6, or 22 for recevables from or payables to any current or former officers, directors, trustees, key employees, highest compensated employees, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? If "Yes," complete Schedule L, Part IV 27b Did the organization aparty to a business transaction with one of the following parties (see Schedule L, Part IV 28a A current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV 27c An entity of which a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule M. Part IV 27d Did the organization and an acurrent or former officer, director, trustee, or key employee? If "Yes," complete Schedule M. Part IV 28a V 27d Did the organization and an acurrent or former offi | | | | | , |
| \$100,000 as of the last day of the year, that was Issued after December 31, 2002? If "Yes," answer lines 24b through 24d and complete Schedule K. "No," go to fine 25a b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? c Did the organization maintain an escrow account other than a refunding escrow at any time during the year? d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? d Did the organization expense that it engaged in an excess benefit transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I is the organization expense that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ7 if "Yes," complete Schedule L, Part I is the organization proor any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons? If "Yes," complete Schedule L, Part II is described by the organization and proprise the organization and proprise | 240 | | 23 | | - |
| through 24d and complete Schedule K. If "No," go to line 25a b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? 25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit transaction with a disqualified person on the unit of the transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization sprior Forms 990 or 990-E27 if "Yes," complete Schedule L, Part I or former officers, directors, trustees, key employees, highest compensated employees or disqualified persons? If "Yes," complete Schedule L, Part II or family member of any of these persons? If "Yes," complete Schedule L, Part III or A nentity or family member of any of these persons? If "Yes," complete Schedule L, Part IV 28 Was the organization aparty to a business transaction with one of the following parties (see Schedule L, Part IV 29 A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV 29 A current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV 29 Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule N, Part II 30 Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule N, Part II 31 Did the organization own 100% of an entity disregarded as separate from the organization under Regulation sections 301.7701-32 nl "Yes," complete Schedule R, Part I, III, or IV, and Part V, line 1 32 Did the organization on the section \$12(b)(13)? If "Yes," complete Schedule R, Part V, line 2 33 Did the organization have a controlled entity within the | 244 | \$100.000 as of the last day of the year, that was issued after December 31, 2002? If "Yes," answer lines, 24b | | | 1 |
| c Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? 25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? if "Yes," complete Schedule L, Part I b is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization sp00 or 990-EZ? If "Yes," complete Schedule L, Part I . 26 Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any ourrent or former officers, directors, trustees, key employees, injusted compensated employees, or disqualified persons? If "Yes," complete Schedule L, Part II . 27 Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? If "Yes," complete Schedule L, Part II . 28 Was the organization aparty to a business transaction with one of the following parties (see Schedule L, Part IV . 29 A current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV . 29 Did the organization oreceive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule N, Part II . 30 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," omplete Schedule N, Part II . 30 Did the organization on 100% of an entity disregarded as separate from the organization under Regulation sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I, III, or IV, and Part V, line 1 . 31 Did the organization have a controlled entity within | | | 24a | | 1 |
| to defease any tax-exempt bonds? d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? 25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I b Is the organization are that it engaged in an excess benefit transaction with a disqualified person of unity the year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ7 If "Yes," complete Schedule L, Part I 25b V 26 Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or former officers, it rustees, key employees, highest compensated employees, or disqualified persons? If "Yes," complete Schedule L, Part III 27 Did the organization provide a grant or other assistance to an officer, director, trustee, key employees, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? If "Yes," complete Schedule L, Part III 28 Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV b A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV c An entity of which a current or former officer, director, trustee, or key employee (or a family member three-officer, director, trustee, or key employee? If "Yes," complete Schedule M, Part II Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M, Part II Did the organization includidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part II Did the organization one one to the organization receive contributions of art, historical treasures, or other similar assets? If "Yes," complete Schedule N, Part II Did the organization on | b | Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? | 24b | | |
| d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? 25a Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I | С | | | - | - |
| 25a Section 501c(s)3, 501c(s)40, and 501c(s)29) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part I . 25a ✓ 25b Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? If "Yes," complete Schedule L, Part I . 25c Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons? If "Yes," complete Schedule L, Part III . 27 Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? If "Yes," complete Schedule L, Part III . 28 Was the organization a parry to a business transaction with one of the following parties (see Schedule L, Part IV . 29 A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV . 29 Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M. 30 Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M. 31 Did the organization in clause of the organization receive and the organization receive and the organization receive contributions? If "Yes," complete Schedule M. 31 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I, III, or IV, and Part V, line 1 35 Did the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Part I, III, or IV, and Part V, l | | · | | | <u> </u> |
| b Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-E27 if "Yes," complete Schedule L, Part I | | | 240 | | |
| b Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990–EZ? If "Yes," complete Schedule L, Part I . 25b Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons? If "Yes," complete Schedule L, Part II . 26 Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? If "Yes," complete Schedule L, Part IV . 27 Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV . 28 A current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV . 29 Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M. 29 Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule N, Part I . 30 Did the organization ilquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I . 31 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule R, Part I, III, or only of the organization neated to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Part I, III, or only of an entity disregarded as separate from the organization with a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, Iine 2 . 31 Did the organization have a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, Iine 2 . 32 Section 501(c)(3) organizations. Did the org | | | 25a | | 1 |
| 25b | b | | | | |
| Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons? If "Yes," complete Schedule L, Part II | | | | | ١, |
| current or former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons? If "Yes," complete Schedule L, Part II 27 Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? If "Yes," complete Schedule L, Part III | | | 25b | | - |
| disqualified persons? If "Yes," complete Schedule L, Part II 7 Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? If "Yes," complete Schedule L, Part III. 7 Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV. 8 Was the organization aparty to a business transaction with one of the following parties (see Schedule L, Part IV. 9 A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV. 10 A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV. 11 C An entity of which a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV. 12 Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M. 13 Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule N, Part I. 14 Did the organization ilquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I. 15 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule N, Part I. 16 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I. 17 Did the organization have a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2. 18 Did the organization organizations. Did the organization make any transfers to an exempt non-charitable related organization. Schedule R, Part V, line 2. 18 Did the organization conduct more than 5% of its activities through an entity that is not a r | 26 | | | | |
| substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? If "Yes," complete Schedule L, Part III | | | 26 | | 1 |
| entity or family member of any of these persons? If "Yes," complete Schedule L, Part III | 27 | Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, | | | |
| Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions): a A current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV b A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV c An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct owner? If "Yes," complete Schedule L, Part IV 28c | | | ļ | | |
| Part IV instructions for applicable filing thresholds, conditions, and exceptions): a A current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV b A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV c An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? If "Yes," complete Schedule L, Part IV 28b | 20 | | | | ✓ |
| b A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV | 20 | | بَا بِي ا | | ₩ |
| Schedule L, Part IV c An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? If "Yes," complete Schedule L, Part IV 29 Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M 30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If "Yes," complete Schedule M 31 Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I 32 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule N, Part II 33 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I 34 Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1 35 Did the organization have a controlled entity within the meaning of section 512(b)(13)? 36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organizations. Did the organization make any transfers to an exempt non-charitable related organization. Schedule R, Part V, line 2 37 Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, Part VI, lines 11b and 19? Note. All Form 990 filers are required to complete Schedule O for Part VI, lines 11b and 19? Note. All Form 990 filers are required to complete Schedule O. | а | | 28a | | 1 |
| c An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? If "Yes," complete Schedule L, Part IV. 29 Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M 30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If "Yes," complete Schedule M 30 Jid the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I 31 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule N, Part II 32 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I . 33 Jid Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1 34 Was the organization have a controlled entity within the meaning of section 512(b)(13)? 35 Jid the organization have a controlled entity within the meaning of section 512(b)(13)? 36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2 36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2 37 Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, Part VI, lines 11b and 19? Note. All Form 990 filers are required to complete Schedule O. | b | | 28b | | 1 |
| Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If "Yes," complete Schedule M Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule N, Part II Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I | С | An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) | | | / |
| Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If "Yes," complete Schedule M | | · | 28c | | 1 |
| conservation contributions? If "Yes," complete Schedule M. 30 | | | 29 | | ✓ |
| Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I | 30 | | 20 | | |
| Part I 31 | 31 | • | 30 | | |
| omplete Schedule N, Part II 32 | | | 31 | | 1 |
| Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I | 32 | | | | |
| sections 301.7701-2 and 301.7701-3? If "Yes," complete Schedule R, Part I | 22 | | 32 | | <u> </u> |
| Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1 | | | 33 | | 1 |
| Did the organization have a controlled entity within the meaning of section 512(b)(13)? | 34 | Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Part II, III, | | | |
| b If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2 | 35a | | | - | 1 |
| Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2 | b | If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a | | | <u> </u> |
| related organization? If "Yes," complete Schedule R, Part V, line 2 | | | 35b | | <u> </u> |
| Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, Part VI | 36 | Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2 | 36 | | |
| and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, Part VI | 37 | | <u> </u> | | |
| Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19? Note. All Form 990 filers are required to complete Schedule O. | | and that is treated as a partnership for federal income tax purposes? If "Yes," complete Schedule R, | | | |
| 19? Note. All Form 990 filers are required to complete Schedule O. 38 ✓ | 20 | | 37 | | ✓ _ |
| | JÖ | | 32 | / | |
| | | | | n 990 | (2016) |

| Part | | | | |
|----------|--|--------------|-----------------|---------------|
| | Check if Schedule O contains a response or note to any line in this Part V | , | <u> ;</u> | |
| | | | Yes | No |
| 1a | Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable 1a 1 | | | 1 |
| ь | Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable | | | |
| ¢ | Did the organization comply with backup withholding rules for reportable payments to vendors and | | | |
| _ | reportable gaming (gambling) winnings to prize winners? | 1c | <u> </u> | |
| 2a | Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax | • | ļ | |
| | Statements, filed for the calendar year ending with or within the year covered by this return 2a 0 | | | |
| b | If at least one is reported on line 2a, did the organization file all required federal employment tax returns? . | 2b |] | <u></u> |
| | Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions) | | | |
| За | Did the organization have unrelated business gross income of \$1,000 or more during the year? | 3a | | ✓ |
| þ | If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation in Schedule 0 | 3b | | L_ |
| 4a | At any time during the calendar year, did the organization have an interest in, or a signature or other authority | | | l |
| | over, a financial account in a foreign country (such as a bank account, securities account, or other financial | | | |
| | account)? | 4a | _ | ✓ |
| b | If "Yes," enter the name of the foreign country: ▶ | | | |
| | See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts | | | |
| | (FBAR). | | | |
| 5a | Was the organization a party to a prohibited tax shelter transaction at any time during the tax year? | 5a | | 1 |
| b | Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction? | 5b | | 1 |
| C | If "Yes" to line 5a or 5b, did the organization file Form 8886-T? | 5c | | |
| 6a | Does the organization have annual gross receipts that are normally greater than \$100,000, and did the | | | |
| | organization solicit any contributions that were not tax deductible as charitable contributions? | 6a | ✓ | |
| b | If "Yes," did the organization include with every solicitation an express statement that such contributions or | | | |
| | gifts were not tax deductible? | 6b | ✓ | |
| 7 | Organizations that may receive deductible contributions under section 170(c). | | | 3.3 |
| а | Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods | | | |
| | and services provided to the payor? | 7a | | |
| b | If "Yes," did the organization notify the donor of the value of the goods or services provided? | 7b | | |
| С | Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was | | | Γ |
| | required to file Form 8282? | 7c | i | l |
| d | If "Yes," indicate the number of Forms 8282 filed during the year | | | |
| е | Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? | 7e | | |
| f | Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? . | 71 | $\neg \uparrow$ | |
| g | If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required? | 7g | $\neg \neg$ | |
| h | If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C? | 7h | $\neg \uparrow$ | $\overline{}$ |
| 8 | Sponsoring organizations maintaining donor advised funds. Did a donor advised fund maintained by the | | | |
| | sponsoring organization have excess business holdings at any time during the year? | 8 | | |
| 9 | Sponsoring organizations maintaining donor advised funds. | | | |
| а | Did the sponsoring organization make any taxable distributions under section 4966? | 9a | | |
| b | Did the sponsoring organization make a distribution to a donor, donor advisor, or related person? | 9b | | |
| 10 | Section 501(c)(7) organizations. Enter: | | الأنوا | |
| а | Initiation fees and capital contributions included on Part VIII, line 12 | | | |
| b | Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities . 10b | | | |
| 11 | Section 501(c)(12) organizations. Enter: | | | |
| а | Gross income from members or shareholders | • | | |
| b | Gross income from other sources (Do not net amounts due or paid to other sources | | | |
| | against amounts due or received from them.) | | | |
| 12a | Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041? | 12a | | |
| b | If "Yes," enter the amount of tax-exempt interest received or accrued during the year 12b | | أحنير | |
| 13 | Section 501(c)(29) qualified nonprofit health insurance issuers. | | | |
| а | Is the organization licensed to issue qualified health plans in more than one state? | 13a | | |
| a | Note. See the instructions for additional information the organization must report on Schedule O. | 100 | أخيرو | |
| ь | Enter the amount of reserves the organization is required to maintain by the states in which | | | |
| | the organization is licensed to issue qualified health plans | | | |
| С | Enter the amount of reserves on hand | | | |
| 14a | Did the organization receive any payments for indoor tanning services during the tax year? | 140 | | - |
| 14a b | If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation in Schedule 0. | 14a | | / |
| O | iii res, nas il nieu a runni rzu lu repuit (nese payments rii ivo, provige an explanation in Schedule U . | 14b | | 1 |

| Part | Governance, Management, and Disclosure For each "Yes" response to lines 2 through 7b below, response to line 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. S. Check if Schedule O contains a response or note to any line in this Part VI | See ins | struct | ions. |
|-------------------|---|---------------|-------------|-------------|
| Section | on A. Governing Body and Management | - | | <u> </u> |
| | on yar do ronning Body and management | | Yes | No |
| 1a | Enter the number of voting members of the governing body at the end of the tax year If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain in Schedule O. | | | |
| b 2 | Enter the number of voting members included in line 1a, above, who are independent . Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee? | 2 | | ✓ |
| 3 | Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors, or trustees, or key employees to a management company or other person? | 3 | } | 1 |
| 4 5 6 7a | Did the organization make any significant changes to its governing documents since the prior Form 990 was filed? Did the organization become aware during the year of a significant diversion of the organization's assets?. Did the organization have members or stockholders? Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body? | 4 5 6 | | √ √ √ |
| þ | Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body? | 7b | | 1 |
| 8 | Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following: | | | |
| a | The governing body? | 8a | ✓ | - |
| 9 9 | Each committee with authority to act on behalf of the governing body? | 8b | ✓ | |
| Section | on B. Policies (This Section B requests information about policies not required by the Internal Reven | 9 | 000 | <u> </u> |
| Section | on b. Policies This Section B requests information about policies not required by the internal never | ive C | Yes | No |
| 10a | Did the organization have local chapters, branches, or affiliates? | 10a | | 1 |
| b | If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes? | 10b | | |
| 11a | Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? | 11a | > | |
| b | Describe in Schedule O the process, if any, used by the organization to review this Form 990. | | | |
| 12a | Did the organization have a written conflict of interest policy? If "No," go to line 13 | 12a | | ✓ |
| c b | Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts? Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," | 12b | 1 | |
| 13 | describe in Schedule O how this was done | 12c 13 | | ✓ |
| 14 15 | Did the organization have a written document retention and destruction policy? | 14 | | <u> </u> |
| a b | The organization's CEO, Executive Director, or top management official | 15a 15b | ✓ | √ |
| 16a | If "Yes" to line 15a or 15b, describe the process in Schedule O (see instructions). Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year? | 16a | | 1 |
| b | If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements? | 16b | | |
| Secti | on C. Disclosure | | | |
| 17 18 | List the states with which a copy of this Form 990 is required to be filed None Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (Section available for public inspection. Indicate how you made these available. Check all that apply. | n 501(| c)(3)s | only) |
| 19 | Own website Another's website Upon request Other (explain in Schedule O) Describe in Schedule O whether (and if so, how) the organization made its governing documents, conflict of int financial statements available to the public during the tax year. | terest į | policy | , and |
| 20 | State the name, address, and telephone number of the person who possesses the organization's books and re FOF, Jonathan Bunch, 1030 15th Street, NW, Suite 182 B1, Washington, DC, 20005, (571) 247-3688 | cords: | > | |

compensated employees; and former such persons.

| Part VII | Compensation of Officers, I | Directors, Trus | tees, Key E | mployees, | Highest (| Compensated | Employees, | and |
|----------|-----------------------------|-----------------|-------------|-----------|-----------|-------------|------------|-----|
| | Independent Contractors | | | | | | | |

Check if Schedule O contains a response or note to any line in this Part VII . _

Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

- 1a Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.
- List all of the organization's current officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
 - List all of the organization's current key employees, if any. See instructions for definition of "key employee."
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee, or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

 List persons in the following order: individual trustees or directors; institutional trustees; officers; key employees; highest

Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee. (C) Position (B) (do not check more than one Name and Title Average Reportable Reportable Estimated box, unless person is both an hours per compensation ompensation from amount of officer and a director/trustee) eek (list an) from other Individual trustee or director Institutional trustee Key employee Highest compensated employee compensation hours for organizations related organization (W-2/1099-MISC) from the organization (W-2/1099-MISC) rganizations pelow dotted and related organizations (1) Star Eiting 5 **Assistant Treasurer** O (2) Jonathan Bunch Treasurer 0 (3) Todd Graves Secretary O 0 (4) Leonard Leo President (6) (7) (9) (10) (11) (12) (13)

| Part | Part VII Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued) | | | | | | | | | | | |
|----------------|---|-------------------------------|--------------------------------|----------------|----------|----------------|------------------------------|-------------------|-----------------------|--------------------------|--------------------------|----|
| | | | | | • | C) sition | | | | | | |
| | (A) Name and title | (do not check more that | | | | | (D) Reportable | (E) Reportable | (F) Estimated | | | |
| | Name and the | hours per | office | | | | ıs botr or/trusi | | compensation | compensation fr | om amount of | |
| | | week (list any hours for | 익호 | 7 | Q | ₹ | 육분 | ਡ | from the | related organizations | other compensation | |
| | | related | Individual trustee or director | Institutional | Officer | y en | p des | Former | organization | (W-2/1099-MIS | C) from the | |
| | | organizations below dotted | ctor | iona Ona |] | employee | 88 |] | (W-2/1099-MISC) | 1 | organization and related | |
| | , | line) | rust | 1 2 | |) ¥ | mpe | | | } | organizations | |
| | , | ļ | 8 | trustee | ļ | | Highest compensated employee | | | | | |
| (4.5) | | | | <u> </u> | L. | <u> </u> | <u> </u> | _ | | | | |
| (15) | | | 1 | | | 1 | | | 1 | | | |
| (16) | | | | ╁ | \vdash | \vdash | | | | | | |
| 32.72 | | | 1 | | | Ì | Ì | | 1 | |) | |
| (17) | | | | T | | | | Г | | | | |
| | | | | L | | _ | | | L | | | |
| (18) | | ļ | | 1 | 1 | | ļ | l | | | | |
| /40 | | | | — | _ | | - | <u> </u> | | | | _ |
| (19) | | | ł | } | | | ŀ | } | | ı | | |
| (20) | | | | - | - | | | - | | | | _ |
| 3777 | | | İ |] | Ì | | Ì | 1 | | | ĺ | |
| (21) | | | | | | | | | ļ | | | _ |
| | | | <u> </u> | L. | | _ | | L | | | | |
| (22) | | ļ | ļ | | | 1 | | ł | | | ļ | |
| (00) | | ļ | ├ — | ├- | | _ | | { — | ļ | <u> </u> | | |
| (23) | | | ŀ | | 1 | | } | | l . | ! | | |
| (24) | | | | - | - | ├ | | - | | | | _ |
| 35.7/ | | | i | | | | | | | | - | |
| (25) | | | | | <u> </u> | 1- | | t – | | | | _ |
| | | | | | | | | | | | | |
| 1b | Sub-total | | | | | | | • | 0 | | 0 | _0 |
| C | Total from continuation sheets to Part | | | • | • | | • | • | 0 | | 0 | 0 |
| <u>d</u> | Total (add lines 1b and 1c) | | | | | | | <u>.</u> | 0 | | 0 | _0 |
| 2 | Total number of individuals (including bur reportable compensation from the organi | t not limited ization 🟲 | to tr | nose | lis1 | ted | above | 9) W | | ore than \$100 |),000 of | |
| — | reportable compensation from the organ | Zation | | | | | | | 00 | | Yes N | |
| 3 | Did the organization list any former of | fficer, direc | tor, c | or tr | ust | ee, | key e | emp | oloyee, or high | est compens | | |
| | employee on line 1a? If "Yes," complete | Schedule J | for s | uch | ind | ivid | ual | | | | . 3 🗸 | _ |
| 4 | For any individual listed on line 1a, is the | | | | | | | | | | | |
| | organization and related organizations | | | | | | f "Ye | s," | complete Sch | edule J for | | |
| _ | individual | | | | | | | • | | | 4 1 | _ |
| 5 | Did any person listed on line 1a receive of for services rendered to the organization | | | | | | | | | ation or indiv | | ļ |
| Section | on B. Independent Contractors | | | | | | | | | | · 13 1 4 | |
| 1 | Complete this table for your five highest | compensat | ed in | dep | end | ent | contr | act | ors that receive | d more than | \$100,000 of | _ |
| | compensation from the organization. Rep | | | | | | | | | | | |
| | year. | | | | | | | | <u></u> | | | |
| | (A) Name and business add | trace | | | | | | 1 | (B) Description of se | an //cas | (C) Compensation | |
| | | | | | | | | Ļ | _ | | | |
| CRC, | 2760 Eisenhower Avenue, Alexandria, Vırgini | a 22314 | | | | | | Pu | blic Relations | | 450,0 | 00 |
| | | | | | | | | \vdash | | | | |
| | | | | | | | | \vdash | | | | |
| | | | | | | | | | | | | _ |
| 2 | Total number of independent contractor | | | | | | | th | nose listed abo | ve) who | | |
| | received more than \$100,000 of compens | sation from | the o | rgan | ızat | ion | • | | 1 | | | |

| Fart | VIII | Check if Schedule O contains a response or note to | anv line in this | Part VIII | | |
|--|----------------|--|----------------------|--|--|--|
| | | Check if Schedule O contains a response or note to | (A) Total revenue | (B) Related or exempt function revenue | (C) Unrelated business revenue | (D) Revenue excluded from tax under sections 512-514 |
| इड | 1a | Federated campaigns 1a | | _ | | |
| Contributions, Gifts, Grants and Other Similar Amounts | ь | Membership dues 1b | | | | |
| s, G | С | Fundraising events 1c | | | | |
| ar / | d | Related organizations 1d | | | | ` - |
| a s | е | Government grants (contributions) 1e | | | | |
| tion S S | f | All other contributions, gifts, grants, | | | | , , |
| the ibu | | and similar amounts not included above 1f 6,285,850 | | | | ्रीहरू न्य |
| d d | g | Noncash contributions included in lines 1a-1f: \$ | | | | * , , |
| ပ္ပ မွ | h_ | Total. Add lines 1a-1f | 6,285,850 | | | |
| Program Service Revenue | | Business Code | | | | |
| Ver | 2a | | | <u> </u> | | |
| 2 | b | | | | | |
| ξ | С | | | | | |
| Se | d | | | | | |
| a E | е | | | | | |
| <u>g</u> | † | All other program service revenue . | | | l | <u> </u> |
| | <u>g</u> _ | Total. Add lines 2a–2f ▶ | | | | |
| | 3 | Investment income (including dividends, interest, and other similar amounts) | | | | |
| | | · | 92 | 0 | 0 | 92 |
| | 4 | Income from investment of tax-exempt bond proceeds | | | <u> </u> | |
| | 5 | Royalties | | | | |
| | 6a | Gross rents | | | | |
| | b | Less: rental expenses | | | | |
| | C | Rental income or (loss) | | | | |
| | d | Net rental income or (loss) | | | _ | |
| | 7a | Gross amount from sales of (i) Securities (ii) Other | | | | |
| | | assets other than inventory | | | | |
| | Ь | Less: cost or other basis | İ | | | |
| | | and sales expenses . | | | | |
| | С | Gain or (loss) | | | ĺ | |
| | d | Net gain or (loss) ▶ | | | | |
| | | | | | | |
| venue | 8a | Gross income from fundraising | ļ | | ļ | ' |
| | | events (not including \$ | | | İ | |
| æ | ļ | of contributions reported on line 1c). | | | | (|
| Other | | See Part IV, line 18 a | | | ! | |
| ₹ | b | Less: direct expenses b | | | | |
| | C | Net income or (loss) from fundraising events . > | | | | |
| | 9a | Gross income from gaming activities. | | | | |
| | ١. | See Part IV, line 19 a | | | | |
| | b | Less: direct expenses b | | | | |
| | | Net income or (loss) from gaming activities Gross sales of inventory, less | | | | |
| | Iva | returns and allowances a | | | ļ | , |
| | ь | Less: cost of goods sold b | | | | |
| | C | Net income or (loss) from sales of inventory . | | | | |
| | ا ا | Miscellaneous Revenue Business Code | | | | |
| | 11a | | | | · | |
| | Ь | | | | t | |
| | c | | | | | |
| | d | All other revenue | | | | |
| | e | Total. Add lines 11a–11d | ! | | | |
| | 12 | Total revenue. See instructions | 6,285,942 | 0 | 0 | 92 |
| | | | | | | Form 990 (2016) |

| Form 99 | 00 (2016) | | | | Page 10 |
|-----------------|--|--|---|-------------------------------------|--------------------------|
| | IX Statement of Functional Expenses | | | | |
| Sectio | n 501(c)(3) and 501(c)(4) organizations must con | | | | |
| | Check if Schedule O contains a response tinclude amounts reported on lines 6b, 7b, and 10b of Part VIII. | se or note to any lir (A) Total expenses | ne in this Part IX . (B) Program service expenses | (C) Management and general expenses | (D) Fundraising expenses |
| 1 | Grants and other assistance to domestic organizations and domestic governments. See Part IV, line 21 | 5,021,000 | 5,021,000 | | |
| 2 | Grants and other assistance to domestic individuals. See Part IV, line 22 | | | | |
| 3 | Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16 | | | | |
| 4 5 | Benefits paid to or for members Compensation of current officers, directors, trustees, and key employees | | | | |
| 6 | Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) | | | | |
| 7 8 | Other salaries and wages Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions) | | | | |
| 9 | Other employee benefits | | | | |
| 10 11 | Payroll taxes | | | | |
| ii a | Fees for services (non-employees): Management | | | | |
| b | Legal | 6,511 | 0: | 6,511 | 0 |
| C | Accounting | 20,000 | 0 | 20,000 | 0 |
| d | Lobbying | | | | |
| е | Professional fundraising services. See Part IV, line 17 | | | | <u></u> |
| f g | Investment management fees | | | | |
| 12 | Advertising and promotion | | | | |
| 13 | Office expenses | 846 | 0 | 846 | 0 |
| 14 | Information technology | | | | |
| 15 | Royalties | | | | |
| 16 17 | Occupancy | | | | |
| 18 | Payments of travel or entertainment expenses for any federal, state, or local public officials | | | | |
| 19 | Conferences, conventions, and meetings . | | | | |
| 20 | Interest | | | | |
| 21 | Payments to affiliates | | | | |
| 22 | Depreciation, depletion, and amortization . | | | | |
| 23 | Insurance | | | | |
| 24 | Other expenses. Itemize expenses not covered above (List miscellaneous expenses in line 24e. If | | | , · | |
| | line 24e amount exceeds 10% of line 25, column | | | ; | 4. |
| | (A) amount, list line 24e expenses on Schedule O.) | | | | |
| а | | | | | |
| b | | | | | |
| C | | | | | |
| d | All all an armanage | ļ | | | |
| e | All other expenses Total functional expenses. Add lines 1 through 24e | | P 004 000 | | |
| <u>25</u> 26 | Joint costs. Complete this line only if the | 5,048,357 | 5,021,000 | 27,357 | 0 |
| 20 | organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. Check here if following SOP 98-2 (ASC 958-720) | | | | |

| P | art X | Balance Sheet | <u> </u> | | |
|-----------------------------|-------|---|--------------------------|------------------|---|
| | | Check if Schedule O contains a response or note to any line in this Par | rt X | | <u>.</u> \square |
| | | | (A) Beginning of year | | (B) End of year |
| | 1 | Cash-non-interest-bearing | 0 | 1 | 1,237,585 |
| | 2 | Savings and temporary cash investments | | 2 | |
| | 3 | Pledges and grants receivable, net | <u> </u> | 3 | |
| | 4 | Accounts receivable, net | | 4 | |
| | 5 | Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L | | 5 | 7 |
| | 6 | Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instructions). Complete Part II of Schedule L | ·:- | - - - 6 | Marie Com |
| ě | 7 | Notes and loans receivable, net | | 7 | |
| Assets | 8 | Inventories for sale or use | | 8 | , , |
| | 9 | | | 9 | |
| | 10a | Prepaid expenses and deterred charges Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D | | 9 | 5. |
| | ь | Less: accumulated depreciation 10b | | 10c | |
| | 11 | Investments—publicly traded securities | | 11 | • |
| | 12 | Investments—other securities. See Part IV, line 11 | | 12 | |
| | 13 | Investments—program-related. See Part IV, line 11 | | 13 | <u>-</u> - |
| | 14 | Intangible assets | | 14 | |
| | 15 | Other assets. See Part IV, line 11 | | 15 | , , - .,, |
| | 16 | Total assets. Add lines 1 through 15 (must equal line 34) | 0 | 16 | 1,237,585 |
| | 17 | Accounts payable and accrued expenses | | 17 | |
| | 18 | Grants payable | | 18 | |
| | 19 | Deferred revenue | | 19 | |
| | 20 | Tax-exempt bond liabilities | | 20 | |
| | 21 | Escrow or custodial account liability. Complete Part IV of Schedule D . | | 21 | |
| es | 22 | Loans and other payables to current and former officers, directors, | | | *** |
| Ħ | | trustees, key employees, highest compensated employees, and | | | |
| Liabilities | | disqualified persons. Complete Part II of Schedule L | | 22 | |
| | 23 | Secured mortgages and notes payable to unrelated third parties | | 23 | |
| | 24 | Unsecured notes and loans payable to unrelated third parties | | 24 | <u> </u> |
| | 25 | Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D | | 25 | |
| | 26 | Total liabilities. Add lines 17 through 25 | | 26 | |
| -ses | | Organizations that follow SFAS 117 (ASC 958), check here ▶ ✓ and complete lines 27 through 29, and lines 33 and 34. | | | |
| ă | 27 | Unrestricted net assets | 0 | 27 | 1,237,585 |
| 3al | 28 | Temporarily restricted net assets | | 28 | |
| ᅙ | 29 | Permanently restricted net assets | | 29 | |
| Net Assets or Fund Balances | | Organizations that do not follow SFAS 117 (ASC 958), check here ▶ ☐ and complete lines 30 through 34. | | | , 1 , |
| និ | 30 | Capital stock or trust principal, or current funds | | 30 | |
| SSe | 31 | Paid-in or capital surplus, or land, building, or equipment fund | | 31 | |
| Ä | 32 | Retained earnings, endowment, accumulated income, or other funds | | 32 | |
| Š | 33 | Total net assets or fund balances | 0 | 33 | 1,237,585 |
| _ | 34_ | Total liabilities and net assets/fund balances | 0 | 34 | 1,237,585 |
| | | | | | Form 990 (2016) |

| Pari | XI Reconciliation of Net Assets | | | | | |
|------------|---|-----------|----------|----------|----------|------------|
| | Check if Schedule O contains a response or note to any line in this Part XI | | | | | |
| 1 | Total revenue (must equal Part VIII, column (A), line 12) | 1 | | | 6,28 | 5,942 |
| 2 | Total expenses (must equal Part IX, column (A), line 25) | 2 | | | 5,04 | 8,357 |
| 3 | Revenue less expenses. Subtract line 2 from line 1 | 3 | | | 1,23 | 7,585 |
| 4 | Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A)) | 4 | | | | 0 |
| 5 | Net unrealized gains (losses) on investments | 5 | | | | |
| 6 | Donated services and use of facilities | 6 | <u> </u> | | | |
| 7 | Investment expenses | 7_ | | | | |
| 8 | Prior period adjustments | 8_ | 1 | | | |
| 9 | Other changes in net assets or fund balances (explain in Schedule O) | 9 | | | | |
| 10 | Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line | | 1 | | | |
| | 33, column (B)) | 10 | <u> </u> | | 1,23 | 7,585 |
| Part | XII Financial Statements and Reporting | | | | | |
| | Check if Schedule O contains a response or note to any line in this Part XII | <u> </u> | | <u>.</u> | :- | |
| 1 | Accounting method used to prepare the Form 990: Cash Accrual Other If the organization changed its method of accounting from a prior year or checked "Other," ex Schedule O. | plain | in [| | Yes | No |
| 2 a | Were the organization's financial statements compiled or reviewed by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were compreviewed on a separate basis, consolidated basis, or both: | | | 2a | | ✓ |
| b | ☐ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis Were the organization's financial statements audited by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were audite separate basis, consolidated basis, or both: | ed on | | 2b | B . | |
| С | Separate basis Consolidated basis Both consolidated and separate basis If "Yes" to line 2a or 2b, does the organization have a committee that assumes responsibility for organization of the audit, review, or compilation of its financial statements and selection of an independent account the organization changed either its oversight process or selection process during the tax year, expenses of the control of the organization changed either its oversight process or selection process during the tax year, expenses or selection process. | ntant | ? | 2c | <u> </u> | Too. As to |
| 3a | Schedule O. As a result of a federal award, was the organization required to undergo an audit or audits as set | • | in | _ | | |
| b | the Single Audit Act and OMB Circular A-133? | | ne | 3a 3b | | 4 |
| | | | | Forn | 990 | (2016) |

SCHEDULE D (Form 990)

Supplemental Financial Statements

► Complete if the organization answered "Yes" on Form 990,

Open to Public Inspection

OMB No 1545-0047

Department of the Treasury Internal Revenue Service

Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b. ► Attach to Form 990.

▶ Information about Schedule D (Form 990) and its instructions is at www.irs.gov/form990. Employer identification number Name of the organization 81-1199959 Freedom and Opportunity Fund Inc. Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts. Complete if the organization answered "Yes" on Form 990, Part IV, line 6. (a) Donor advised funds (b) Funds and other accounts 1 2 Aggregate value of contributions to (during year) 6,285,850 3 Aggregate value of grants from (during year) . 5,021,000 Aggregate value at end of year 1.241.274 Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? ✓ Yes □ No. Did the organization inform all grantees, donors, and donor advisors in writing that grant funds can be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose Conservation Easements. Part II Complete if the organization answered "Yes" on Form 990, Part IV, line 7. Purpose(s) of conservation easements held by the organization (check all that apply). Preservation of land for public use (e.g., recreation or education) Preservation of a historically important land area Protection of natural habitat ☐ Preservation of a certified historic structure ☐ Preservation of open space Complete lines 2a through 2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year. Held at the End of the Tax Year 2b Number of conservation easements on a certified historic structure included in (a) 2c Number of conservation easements included in (c) acquired after 8/17/06, and not on a 3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the 4 Number of states where property subject to conservation easement is located ▶ 5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of Staff and volunteer hours devoted to monitoring, inspecting, handling of violations, and enforcing conservation easements during the year 7 Amount of expenses incurred in monitoring, inspecting, handling of violations, and enforcing conservation easements during the year Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(l) 8 In Part XIII, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements. Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets. Part III Complete if the organization answered "Yes" on Form 990, Part IV, line 8. If the organization elected, as permitted under SFAS 116 (ASC 958), not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIII, the text of the footnote to its financial statements that describes these items. b If the organization elected, as permitted under SFAS 116 (ASC 958), to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items: (i) Revenue included on Form 990, Part VIII, line 1 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 (ASC 958) relating to these items:

b Assets included in Form 990, Part X

| Part | III Organizations Maintaining | | | | | | | | |
|---------|---|--|--------------|------------|--------------------------|--------------|----------------------------|--------------------|-------------|
| 3 | Using the organization's acquisition, collection items (check all that apply): | | ther recor | ds, chec | k any of th | e follow | ring that are a | significant use | of its |
| а | ☐ Public exhibition | | d [| Loan | or exchang | je progr | ams | | |
| b | ☐ Scholarly research | | e (| ☐ Other | | | | | |
| C | ☐ Preservation for future generations | 5 | | | | | | | |
| 4 | Provide a description of the organiza XIII. | tion's collections | and expla | in how th | ney further | the org | anization's exc | empt purpose in | Part |
| 5 | During the year, did the organization | | | | | | | | |
| | assets to be sold to raise funds rather | | ained as p | art of the | organizati | on's co | llection? . | · 🗌 Yes 🗌 | <u> No</u> |
| Part | IV Escrow and Custodial Arra | | | | | _ | | | |
| | Complete if the organization | i answered "Yes | on For | m 990, F | art IV, line | 9, or 1 | repoπed an a | imount on Forr | n |
| | 990, Part X, line 21. Is the organization an agent, trustee | custodian or oth | oer interm | ediany fo | r contribut | ione or | other assets | not | |
| 14 | included on Form 990, Part X? | | | | | | | | l No |
| b | If "Yes," explain the arrangement in P | | | | | | • • • • | . Les L |] 140 |
| | ii res, explain the arrangement iir i | art Am and Compi | | nowing te | , DIO. | Γ | 1 | Amount | |
| С | Beginning balance | | | | | 1c | | | |
| ď | Additions during the year | | | | | 1d | | · | |
| е | Distributions during the year | | | | | 1e | | | |
| f | Ending balance | | | | | 1f | | | |
| 2a | Did the organization include an amou | | | | | | | | |
| | If "Yes," explain the arrangement in P | art XIII. Check her | e if the ex | planation | n has been | provide | ed on Part XIII | <u> </u> | <u>]</u> |
| Par | t V Endowment Funds. | | | | | | | | |
| | Complete if the organization | | | | | | (D. Th | | |
| 4 | Destruis a starra balanca | (a) Current year | (b) Pric | or year | (c) Two year | SDACK | (d) Three years ba | ack (e) Four years | Jack |
| 1a h | Beginning of year balance | | | | ļ | | | | |
| p p | Contributions | | | | | | | | |
| v | losses | } | Ì | | | 1 | | } | |
| d | Grants or scholarships | | | | | | | | |
| e | Other expenditures for facilities and | ļ ———————————————————————————————————— | | | | | | - | |
| | programs | | | | | | | | |
| f | Administrative expenses | | | | | | | | |
| 9 | End of year balance | | | | | | | | |
| 2 | Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as: | | | | | | | | |
| a | Board designated or quasi-endowme | nt 🕨 | % | | | | | | |
| b | Permanent endowment ▶ | % | | | | | | | |
| С | Temporarily restricted endowment ► | | 1000/ | | | | | | |
| 3a | The percentages on lines 2a, 2b, and Are there endowment funds not in the | zc should equal | | zation the | at are held | ചെർ ചർ | ministered for | the | |
| Ja | organization by: | e possession of t | ne organi | zation the | at ate lielu | and ad | ministered for | Yes | No |
| | (i) unrelated organizations | | | | | | | . 3a(i) | 140_ |
| | (ii) related organizations | | | | | | | . 3a(ii) | |
| b | If "Yes" on line 3a(ii), are the related of | | | | | | | . 3b | |
| 4 | Describe in Part XIII the intended use | | on's endo | wment f | unds. | | | | |
| Par | VI Land, Buildings, and Equip | | | | | | | | |
| | Complete if the organization | answered "Yes | on For | m 990, I | Part IV, line | e 11a. | See Form 99 | 0, Part X, line 1 | 0. |
| | Description of property | (a) Cost or o | | | or other basis other) | | Accumulated epreciation | (d) Book value | , |
| 1a | Land | | | | | | | | |
| b | Buildings | | | | | | | | |
| C | Leasehold improvements | | | | | | | | |
| d | Equipment | | | | | | | L | |
| e | Other | · | 200 6 | <u> </u> | (0) (1) | | | | |
| Total. | . Add lines 1a through 1e. (Column (d) i | nust equal Form S | 990, Part 2 | k, columi | n (B), line 10 | <i>IC.</i>) | ▶ | | |

| Complete if the organization answered "Yes" on Form 990, Part IV, line 11b. See Form 990, Part X, line 12. (a) Description descript or category (b) Book value (c) Method of variety (c) Cost or end-of-year market value (c) Cost or end-of-year market value (c) Cost or end-of-year market value (d) Cost or end-of-year market value (e) Cost or end-of-year market value (e) Cost or end-of-year market value (f) Cost or end-of-year market value (g) Cost or end-of-year market value (g) Cost or end-of-year market value (g) Cost or end-of-year market value (g) Cost or end-of-year market value (g) Description of envesiment (g) Description o | Part VII | Investments - Other Securities | | - um 000 Dort IV line | 11h Can Form OO | O Dort V line 12 |
|--|----------------|---|--------------------|---------------------------------------|---|---------------------------------------|
| Cost or end-of-year market value | | | | T | | |
| 29 Closely-held equity interests | | (including name of security) | · | (b) Book value | | |
| (3) Other (4) (5) (6) (7) | | | | | | |
| Col. Column (a) must equal from \$90, Part X, col. (B) line 13. | | | | | | |
| (G) (G) (G) (G) (G) (G) (G) (G) (G) (G) | 3) Other | | | - | | |
| Complete if the organization answered "Yes" on Form 990, Part IV, line 11d. See Form 990, Part X, line 15. Complete if the organization answered "Yes" on Form 990, Part IV, line 11d. See Form 990, Part X, line 15. Complete if the organization answered "Yes" on Form 990, Part IV, line 11d. See Form 990, Part X, line 15. Complete if the organization answered "Yes" on Form 990, Part IV, line 11d. See Form 990, Part X, line 15. Complete if the organization answered "Yes" on Form 990, Part IV, line 11d. See Form 990, Part X, line 15. Complete if the organization answered "Yes" on Form 990, Part IV, line 11d. See Form 990, Part X, line 15. Complete if the organization answered "Yes" on Form 990, Part IV, line 11d. See Form 990, Part X, line 15. Complete if the organization answered "Yes" on Form 990, Part IV, line 11d. See Form 990, Part X, line 15. Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25. Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25. Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25. Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25. Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25. Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25. Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25. Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25. Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25. Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 15. Complete if | | | | | | |
| Complete if the organization answered "Yes" on Form 990, Part IV, line 11c. See Form 990, Part X, line 13. | | | | | | |
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| (6) (6) (7) (8) (9) (9) (9) (9) (9) (9) (9) (9) (9) (9 | | | | | | |
| Final Column (b) must squal Form 990, Part X, col. (B) line 12) Fart VIII | | | | | | |
| Investments - Program Related. Complete if the organization answered "Yes" on Form 990, Part IV, line 11c. See Form 990, Part X, line 13. | | | | | | |
| Investments - Program Related. Complete if the organization answered "Yes" on Form 990, Part IV, line 11c. See Form 990, Part X, line 13. | Fotal. (Column | (b) must equal Form 990, Part X, col. (B) line 12.) ▶ | | | | |
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| (2) (3) (4) (5) (6) (7) (8) (9) Total. (Column (b) must equal Form 990, Part X, col. (B) line 13.) ▶ Part X Other Assets. Complete if the organization answered "Yes" on Form 990, Part IV, line 11d. See Form 990, Part X, line 15. (a) Description (b) Book value (b) Book value (c) (c) (d) (e) (e) (e) (e) (e) (e) (e) (e) (e) (e | | (a) Description of investment | | (b) Book value | | |
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| (6) (7) (8) (9) Total. (Column (b) must equal Form 990, Part X, col. (B) line 13.) ▶ Part IX Other Assets. Complete if the organization answered "Yes" on Form 990, Part IV, line 11d. See Form 990, Part X, line 15. (a) Description (b) Book value (1) (2) (3) (4) (5) (6) (7) (8) (9) Total. (Column (b) must equal Form 990, Part X, col. (B) line 15.) Part X Other Liabilities. Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25. 1. (a) Description of liability (b) Book value (1) Federal income taxes (2) (3) (4) (5) (6) (7) (7) (8) (9) Total. (Column (b) must equal Form 990, Part X, col. (B) line 25.) ▶ Total. (Column (b) must equal Form 990, Part X, col. (B) line 25.) ▶ | | | | | | |
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| (2) (3) (4) (5) (6) (7) (8) (9) Total. (Column (b) must equal Form 990, Part X, col. (B) line 15.) Part X Other Liabilities. Complete if the organization answered "Yes" on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25. 1. (a) Description of liability (b) Book value (1) Federal income taxes (2) (3) (4) (5) (6) (7) (8) (9) Total. (Column (b) must equal Form 990, Part X, col. (B) line 25.) ▶ | | | | | | |
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| (6) (7) (8) (9) Total. (Column (b) must equal Form 990, Part X, col. (B) line 25.) ▶ | (4) | | | | | |
| (7) (8) (9) Total. (Column (b) must equal Form 990, Part X, col. (B) line 25.) ▶ | | | | | | |
| (8) (9) Total. (Column (b) must equal Form 990, Part X, col. (B) line 25.) ▶ | | | | | | |
| (9) Total. (Column (b) must equal Form 990, Part X, col. (B) line 25.) ▶ | | | | | | |
| Total. (Column (b) must equal Form 990, Part X, col. (B) line 25.) ▶ | | | | | | |
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| A CLIND F THE CONTRACT IN PROJECT IN PROJECT IN THE CONTRACT IN CO | Total, (Column | (b) must equal Form 990, Part X, col. (B) line 25.) ▶ | ·] | J | | |

| Par | | | er Return. | |
|------|---|--------------|---------------|-------------------|
| | Complete if the organization answered "Yes" on Form 990, | | | |
| 1 | Total revenue, gains, and other support per audited financial statements | | . 1 | 6,285,942 |
| 2 | Amounts included on line 1 but not on Form 990, Part VIII, line 12: | 1 | A | |
| а | Net unrealized gains (losses) on investments | 2a | | |
| þ | Donated services and use of facilities | 2b | | |
| C | Recoveries of prior year grants | 2c | 3 50 | |
| ď | Other (Describe in Part XIII.) | 2d | 4 | |
| е | Add lines 2a through 2d | | . 2e | |
| 3 | Subtract line 2e from line 1 | , . , | . 3 | 6,285,942 |
| 4 | Amounts included on Form 990, Part VIII, line 12, but not on line 1: | | ** | |
| а | Investment expenses not included on Form 990, Part VIII, line 7b | 4a | -4: | |
| b | Other (Describe in Part XIII.) | 4b | | |
| _c | Add lines 4a and 4b | | . 4c | |
| 5 | Total revenue. Add lines 3 and 4c. (This must equal Form 990, Part I, line | | | 6,285,942 |
| Part | | | per Keturn. | |
| | Complete if the organization answered "Yes" on Form 990, | | | <u> </u> |
| 1 | Total expenses and losses per audited financial statements | | · 1 | 5,048,357 |
| 2 | Amounts included on line 1 but not on Form 990, Part IX, line 25: | | | |
| a | Donated services and use of facilities | 2a | - 1 | |
| b | Prior year adjustments | | <u> </u> | |
| c | Other losses | 2c | - | |
| d | Other (Describe in Part XIII.) | | | |
| e | Add lines 2a through 2d | | . 2e | |
| 3 | Subtract line 2e from line 1 | 1 . 1 | . 3 | 5,048,357 |
| 4 | · , , , , , , , , , , , , , , , , , , , | 140 | 3. | |
| a | Investment expenses not included on Form 990, Part VIII, line 7b Other (Describe in Part XIII.) | | | |
| b | , | | | |
| 5 | Add lines 4a and 4b | | 4c 5 | 5.040.257 |
| | XIII Supplemental Information. | | <u> </u> | 5,048,357 |
| | le the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a ar t XI, lines 2d and 4b; and Part XII, lines 2d and 4b. Also complete this part | | | e 4; Part X, line |
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SCHEDULEI (Form 990) Department of the Treasury Internal Revenue Service

Governments, and Individuals in the United States Grants and Other Assistance to Organizations,

Complete if the organization answered "Yes" on Form 990, Part IV, line 21 or 22.

2016

OMB No 1545-0047

Open to Public Inspection

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Employer identification number √ Yes 81-1199959 Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and ► Attach to Form 990. ► Information about Schedule I (Form 990) and its instructions is at www.irs.gov/form990. the selection criteria used to award the grants or assistance? Freedom and Opportunity Fund Inc.

Part I General Information on Grants and Assistance Name of the organization

Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States.

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| Part II Grants and Other As 990, Part IV, line 21, f | ssistance to Do for any recipient | mestic Organiz that received m | ations and Don ore than \$5,000. | nestic Governm Part II can be du | ents. Complete uplicated if addit | Grants and Other Assistance to Domestic Organizations and Domestic Governments. Complete if the organization answered "Yes" on Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed. | vered "Yes" on Form |
|--|---|--|---|---------------------------------------|---|--|------------------------------------|
| (a) Name and address of organization or government | (b) EIN | (c) IRC section (if applicable) | (d) Amount of cash grant | (e) Amount of non- cash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of noncash assistance | (h) Purpose of grant or assistance |
| (1) Arizona Chamber of Commerce 3200 N Central Ave #1125 Phoenix AZ | 86-0290347 | 501c6 | 250,000 | 0 | e/u | nla | general support |
| (2) Arizona Mexico Comission 1700 W Washington St #300 Phoenix | 23-7290803 | 501c4 | 20,000 | 0 | 0 r <i>u</i> /a | n/a | general support |
| (3) Prosper Inc. PO 32376 Phoenix AZ 85064 | 46-1899951 | 501c4 | 000'09 | 0 | 0 n/a | n/a | general support |
| (4) Center for Individual Freedom 815 King St Alexandria VA 22314 | 54-1916980 | 501c4 | 000'09 | 0 | 0 1/3 | n/a | general support |
| (5) Retire Safe 1616 H St NW #902 DC 20006 | 48-1108059 | 501c4 | 000'69 | 0 | r/a | n/a | general support |
| (6) National Taxpayer Union 25 Massachusetts Ave #140 DC | 52-1009116 | 501c4 | 21,000 | 0 | 0 n/a | rıla | general support |
| (7) CSG Action 9365 Counselors Row #200 46240 | 27-4648506 | 501c4 | 2,000,000 | 0 | 0 n/a | nla | general support |
| (8) Independent Women's Voice 1875 I St NW #500 DC 20006 | 36-4534086 | 501c4 | 2,000,000 | 0 | 0 n/a | n/a | general support |
| (9) Protect Internet Freedom 750 17th St NW #900 DC 20006 | 47-3020439 | 501c4 | 000'01 | 0 | 0 n/a | n/a | general support |
| (10) | | | | | | | |
| (11) | | | | | | - | |
| (12) | | | | | | | |
| 2 Enter total number of section 501(c)(3) and government or3 Enter total number of other organizations listed in the line | 1501(c)(3) and gov rganizations listec | ernment organizat I in the line 1 table | organizations listed in the line 1 table 1 1 table | ine 1 table | | | O 6 |

Schedule I (Form 990) (2016)

Cat. No. 50055P

For Paperwork Reduction Act Notice, see the Instructions for Form 990.

| Schedule 1 (F | Schedule I (Form 990) (2016) Schedule I (Form 990) (2016) Part III Grants and Other Assistance to Domestic Individuals. Complete if the organization answered "Yes" on Form 990, Part IV, line 22. | 59 mestic Individua | ls. Complete if the | organization answ | ered "Yes" on Form 990, | Part IV, line 22. |
|---------------|--|---|--------------------------|---------------------------------------|--|---------------------------------------|
| | Part III can be duplicated if additional space is needed. | space is needed. | |) | | |
| į | (a) Type of grant or assistance | (b) Number of recipients | (c) Amount of cash grant | (d) Amount of noncash assistance | (e) Method of valuation (book, FMV, appraisal, other) | (f) Description of noncash assistance |
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| Part IV | Supplemental Information. Provide the information required in Part I, line 2; Part III, column (b); and any other additional information. | he information re | quired in Part I, lin | e 2; Part III, columr | ι (b); and any other addit | ional information. |
| Partl, Line | Partl, Line 3: The grants are awarded for general support. Freedom and Opportunity Fund monitors the use of the grants by obtaining annual reports from grantees. | Freedom and Oppor | rtunity Fund monitors | sthe use of the grants. | by obtaining annual reports ! | from grantees. |
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SCHEDULE O (Form 990 or 990-EZ)

Supplemental Information to Form 990 or 990-EZ

Complete to provide information for responses to specific questions on Form 990 or 990-EZ or to provide any additional information.

2016

OMB No. 1545-0047

Department of the Treasury Internal Revenue Service Name of the organization ► Attach to Form 990 or 990-EZ.

Information about Schedule O (Form 990 or 990-EZ) and its instructions is at www.irs.gov/form990.

Open to Public Inspection

Employer identification number

| Freedom and Opportunity Fund Inc. | 81-1199959 |
|--|----------------------------------|
| Form 990, Page 1, Box B: This amended return is submitted in order to amend Schedule I, Part II, Line | (9) to change the address of the |
| grant recipient Protect Internet Freedom. | |
| Form 990, Part VI, Section B, Line 11b: The Form 990 is prepared by a Certified Public Accountant. It is | distributed to officers |
| for review, prior to filing with the Internal Revenue Service (IRS). | |
| Form 990, Part VI, Section B, Line 12c: Each year, all officers are required to disclose any potential cor | flicts of interest. |
| Form 990, Part VI, Section B, Line 15: The corporate By-Laws include instruction regarding any compe | nsation to members |
| of the Governing Body. However, no compensation was paid this year. | |
| Form 990, Part VI, Section C, Line 19: The documents are not available to the general public, except as | provided in Form 1024 filed with |
| the IRS, or as included in incorporation documents filed with the Delaware Secretary of State. | |
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